

**CA-PMM****Project Name:** e-Commerce Portal Infrastructure (EPI) Project**OCIO Project #:** 1730-185**Department:** Franchise Tax Board**Reporting Period:** From: 4/1/09 To: 6/30/09**Team Member to Project Manager****Current Task Summary**

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
EPI Network - User Connectivity Testing	4/20/09	4/20/09	
EPI Production Static - Full Static Production Context Testing	4/26/09	4/6/09	
*See Attached Project Schedule			
<b>Accomplished this week</b>			
<b>Planned/Scheduled Completion in Next Two Weeks</b>			
<b>Status Summary</b>	<b>Yes/No</b>	<b>Explanation</b>	
Will all assigned tasks be accomplished by their due date?	Yes		
Are there any planned tasks that won't be completed?	No		
Are there problems which affect your ability to accomplish assigned tasks?	Yes		
Do you plan to take time off that is not currently scheduled?	No		

**Status of Assigned Issues**

Issue Number	Description	Due Date	Status
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Manager**


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Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	No			
4. Were there any changes to scope?	No			
5. Were tasks added that were not originally estimated?	No			
6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	Yes	Addtl IPS tuning needed	Possible delay of full IPS implementation	Addtl vendor resources assigned to assist.
9. Are there any staffing problems?	Yes	Limited resources	Delay of certain tasks; learning curve	New resource brought in

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Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No	Limited resources are always a concern.	

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## Project Manager to Sponsor

### Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period**.*

Configuration of Infrastructure Components

Development of Testing and Migration plans

- ☐ Continued Test Plan scheduling based on environmental availability (Annual Change Period and Filing Season planning continues)
- ☐ Continued Project Schedule assessment to address activity changes
- ☐ Spirent testing failed due to configuration issues – Cisco came on site and tested bandwidth and firewalls successfully.
- ☐ Cisco provided an IPS Analysis Engine fix which solved the Engine crashes.
- ☐ Due to ongoing IPS Signature and training issues, Staging environment not implemented until the end of June.
- ☐ Resource issues also heavily impacted the project schedule, although we will still migrate by August 31st.
- ☐ Virtual Servers included in Infrastructure diagrams.
- ☐ Department paid off EPI financing for security and network equipment.
- ☐ Budget/BCP issues resolved.

Project still expected to be fully implemented by 11/02/09.

### Project Milestones:

*List key milestones and their dates from the project schedule.*

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
Please see attached Project Schedule					

### Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	X			
Milestones	X			

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Deliverables	X			
Resources	X			
OneTime Cost	X			
Continuing Cost	X			

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## Sponsor to Executive Committee

### Summary Milestones and Highlights

<b>Project Milestones:</b> <i>List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.</i>					
<b>Milestone</b>	<b>Target Date</b>	<b>Forecast Date</b>	<b>Status</b>	<b>If Delayed, Impact to Implementation Date</b>	<b>Date Completed</b>
Please see attached Project Schedule					

<b>Variances</b> Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance". <i>* Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis</i>				
	<b>On Plan &lt;5%</b>	<b>Caution 5-10%</b>	<b>Significant Variance &gt;10%</b>	<b>Action Required</b>
Schedule	X			
Milestones	X			
Deliverables	X			
Resources	X			
One Time Cost	X			
Continuing Cost	X			



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Committee****Monitoring Vital Signs Scorecard**

Vital Sign	Variance	Value	Your Score	Score Justification
1. Customer Buy-In	High Degree of Buy-In	0	0	Green
	Medium Degree of Buy-In	1		
	Low Degree of Buy-In	2		
2. Technology Viability	Strong Viability	0	0	Green
	Medium Viability	1		
	Weak Viability	2		
3. Status of the Critical Path (delay)	<5%	0	0	Green
	5% to 10%	1		
	>10%	2		
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0	Green
	5% to 10%	1		
	>10%	2		
5. High-Probability, High-Impact Risks	0 to 3	0	0	Green
	4 to 6	1		
	>6	2		
6. Unresolved Issues (on time resolution)	On time	0	0	Green
	Late with no impact	1		
	Late impacting the critical path	2		
7. Sponsorship Commitment	Fully engaged	0	0	Green
	Partially engaged	1		
	Inadequate engagement	2		
8. Strategy Alignment	Strong alignment	0	0	Green
	Partial alignment	1		
	Weak or no alignment	2		
9. Value-to-Business	Strong	0	0	Green
	Medium	1		

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	Weak	2	5
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10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	0	Green	
	Medium	1			
	Weak	2			
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0	Green	
	80-90% on time	1			
	<80% on time	2			
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0	Green	
	80-90% on time	1			
	<80% on time	2			
13. Actual vs. Planned Resources	>90% assigned and available	0	0	Green	
	80-90% assigned and available	1			
	<80% assigned and available	2			
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0	Green	
	15-25%	1			
	>25%	2			
15. Team Effectiveness	Highly Effective	0	0	Green	
	Moderately Effective	1			
	Ineffective	2			
<b>Total</b>			<b>0</b>	<b>G</b>	

Green = 0 - 8  
Yellow = 9 - 19  
Red = 20+

**Vendor Viability Rating Rationale**

Schedule Status - include the milestones and deliverables identified in the latest approved schedule in the FSR, PCR, or SPR.

\* **Non-Applicable - N/A** for Tasks related to -Technical Design Consultant bid, Technical Implementation Consultant bid and Hardware/Software bid - since no competitive bid conducted or required.

\*\*Renegotiations of costs were required which extended the time to award the contract.

\*\*\*Technical Design Consultant & Technical Implementation Consultant were awarded in the same contract.

Milestone and Deliverable	Approved Start Date	Actual Start Date	Approved Completion Date	Actual Completion Date	Percent Complete
Obtain GC Approval on FSR	5/8/2006	5/8/2006	5/30/2006	6/8/2006	100%
Obtain Agency & DOF FSR Approval	6/1/2006	6/10/2006	1/12/2007	1/10/2007	100%
Complete Information Technology Procurement Plan (ITPP) and obtain approval	5/9/2006	5/9/2006	1/30/2007	7/24/2007	100%
Project Start (DOF Approved 1/10/07)	1/16/2007	1/17/2007	1/16/2007	1/17/2007	100%
Research: Develop and release competitive bid solicitation(s) for Technical design Consultant(s)	1/17/2007	N/A *	3/16/2007	N/A *	100%
Receive Technical Design Consultant Proposal	4/30/2007	N/A *	4/30/2007	N/A *	100%
Evaluate and Review Technical Design Consultants Bid Response(s)	5/1/2007	N/A *	6/30/2007	N/A *	100%
Award (s) Technical Design Consultants bid	7/2/2007	8/9/2007	7/2/2007	8/9/2007	100%
Technical Design Consultants Starts	7/16/2007	8/27/2007	10/1/2007	8/27/2007	100%
Prepare & Release Bid Documents for Oversight Services	1/16/2007	2/1/2007	2/28/2007	5/18/2007	100%
Receive Vendor Proposals for Oversight Services	3/30/2007	6/12/2007	3/30/2007	6/12/2007	100%
Evaluate/Review Vendor Proposals	4/3/2007	6/19/2007	4/30/2007	7/26/2007	100%
Award Oversight Vendor Agreement(s)	7/2/2007	7/27/2007	7/2/2007	8/30/07**	100%
Oversight Vendor Starts	7/16/2007	10/1/2007	7/16/2007	10/1/2007	100%
Begin the validation of Technical design, work with technical partners, and vendor partners - Prepare Component Infrastructure Bids – High Level Design	10/1/2007	8/29/2007	11/30/2007	12/24/2007	100%

Hardware Research: Develop and release competitive bid solicitation documents(s) for CMAS, and competitive bid acquisitions.	12/3/2007	10/30/2007	2/28/2008	12/21/2007	100%
Software Research: Develop and release competitive bid solicitation document(s) for software license acquisitions.	12/3/2007	10/30/2007	2/28/2008	12/21/2007	100%
Research: Develop and release competitive bid solicitation(s) for Technical Implementation Consultant (s)	8/1/2008	N/A *	9/30/2008	N/A *	100%
Receive/Evaluate/Review Bid Response(s) for Hardware	3/3/2008	N/A*	4/15/2008	N/A*	100%
Receive/Evaluate/Review Bid Response(s) for Software	3/3/2008	N/A*	4/15/2008	N/A*	100%
Receive/Review Technical Implementation Consultants Bid Response(s)	11/17/2008	N/A *	12/17/2008	N/A *	100%
Award Procurement Hardware Agreement(s)	4/16/2008	12/28/2007	4/16/2008	12/28/2007	100%
Award Procurement Software Agreement(s)	4/16/2008	12/28/07	4/16/2008	12/28/07	100%
Award Technical Implementation Consultants Agreement(s)	12/18/2008	8/9/07***	12/18/2008	8/9/07***	100%
Attend Technical Training	10/1/2007	1/14/2008	6/30/2009		90%
Received Hardware	6/16/2008	1/28/2008	6/16/2008	12/15/2008	100%
Received Software	6/16/2008	1/28/2008	6/16/2008	12/15/2008	100%
Technical Implementation Consultants Start *Needed to be included as part of the 8/2007 & subsequent status reports	1/5/2009	*8/27/07	1/5/2009		100%
Rack mount and patch Infrastructure components (Hardware and Software) *Overlooked & needed to be included as part of the 2/2008 status report	8/18/2008	*2/15/08	9/30/2008	12/17/2008	100%
Burn-in equipment	8/18/2008	4/1/2008	9/30/2008	12/18/2008	100%
Acceptance Testing of Equipment	8/18/2008	8/11/2008	9/30/2008	12/29/2008	100%
Configuration of Infrastructure Components	10/1/2008	7/1/2008	4/30/2009	4/30/2009	100%

Develop Testing and Migration Plans	10/1/2008	2/4/2008	1/30/2009	4/30/2009	100%
Technical implementation Consultant on site to assist with migration (exact months TBD)	1/5/2009		11/2/2009		25%
Move servers and applications from existing DMZ to new EPI network (Implement testing and migration plans)	5/1/2009	4/30/2009	11/2/2009		70%
Conduct Project Retrospective	11/16/2009		2/15/2010		%
Prepare Post Implementation Evaluation Report (PIER)	6/1/2010		11/2/2010		%